

Will everything you own be worth more than \$1,500,000? Yes No
(Be sure to include death benefits from any insurance, 401(k) plans, IRAs or other pensions, as well as your share of any jointly held property)

Do you or your spouse anticipate receiving a substantial inheritance? (Over \$500,000) Yes No

Do you already have a will? No Yes (please attach copy)

Do you have substantial life insurance No Yes (provide details)

Whose Names appear on the deed to your home? _____

ISSUES RELATING TO YOUR WILL

Who would you like to take care of your affairs and care for your minor or disabled children when you die? Please provide the full names of those persons below.

Personal Representative: This is the person who collects your assets, pays your bills, and makes sure the terms of your will are carried out. The Personal Representative is usually your spouse with the alternate being a responsible child, trusted friend, or attorney. Try to anticipate if your named Personal Representative :
(1) is willing to assume the responsibility; (2) will be competent to assume the duties several years from now; and (3) has the financial/business judgment you deem necessary to handle your estate.

Your Will

Spouses' Will

Primary Choice: _____

Alternate Choice: _____

GUARDIANS OF YOUR CHILDREN: Do you want to name a person(s) to take care of your minor (under the age of 18) or disabled children in the event of your death and there is no other parent of such child living?

Your Will

Spouses' Will

Primary Choice: _____

Alternate Choice: _____

Trustee of Trust for Minor Children: Most people are uncomfortable with distributing a large sum of money to an 18 year old. You have the choice of specifying at what age your child has uncontrolled access to the gift you make. The Trustee has control of the gift assets until the child reaches the specified age, with the discretion to give the child such sums of money as the Trustee believes is appropriate for the child's education, health, and support. Often the named guardian is also the trustee, but you can name anyone.

Your Will

Spouses' Will

Primary Choice: _____

Alternate Choice: _____

Age at which you wish the child to have uncontrolled access to the gift you make: _____

Ultimate Disposition:

Who should get your property when you die? After the death of the second spouse to die, your assets are given to your beneficiaries. You can give specific items to a specific person or organization (charity). You can simply ask that your estate be divided among your children. Please check one of the following:

- When I die, my spouse receives my entire estate. If my spouse dies before me, my estate should be divided equally among my children.
- I presently have no spouse and wish my estate to be divided equally amount my children.
- I have no spouse or children, and wish my estate to go to the following individuals or organizations. (Note that as you provide for other than you immediately family, you are getting into a complex will.)

Name	Relationship	Address	Percent of Estate
_____	_____	_____	_____

_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

Other Basic Will Package Documents you may want to consider:

Do you want a **Living Will** to indicate your life support wishes should you become terminally ill or permanently unconscious?

Yes

No

Do you want a **Durable Power of Attorney for Health Care** naming a person to make health care decisions for you should you become permanently or temporarily unable to do so?

Yes

No

For You

For Your Spouse

Primary Choice: _____

Alternate Choice: _____

Do you want a **Power of Attorney for Financial Affairs** naming someone to handle your financial matters should you become unable to do so?

Yes

No

For You

For Your Spouse

Primary Choice: _____

Alternate Choice: _____

Remarks/ Comments/ Questions: